

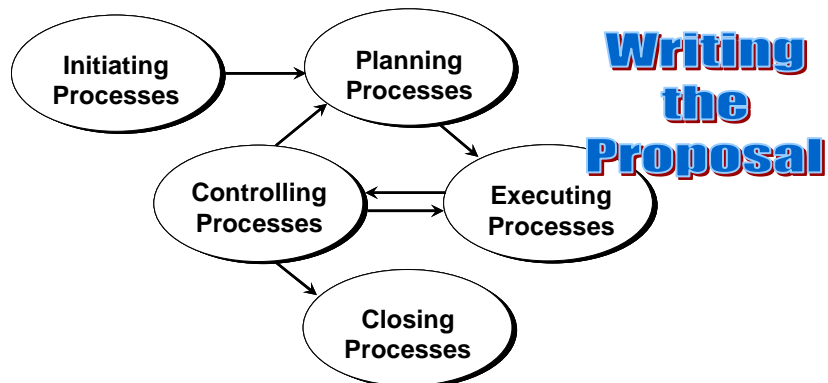


My Project is a Proposal

Kenneth S. Merwin
20 March 2008



Five Phases of a Project



Proposal Drivers

- **Schedule**
 - Primary driver
 - If you are one minute late, you are late
- **Scope**
 - Secondary driver
 - Strict formatting requirements
 - Pricing must be perfect
- **Budget**
 - Limited Bid & Proposal (B&P) Funds

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Tools

- **Time**
 - Milestone Charts
 - MS Project Schedule
 - Calendar
- **Scope**
 - Storyboards
 - Compliance Matrix
 - Outline
 - Writers' Information

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Request For Proposal Contents

- | | |
|----------------------------------|---|
| A. SF-33/SF-1449 | I. Contract Clauses |
| B. Cost Schedule | J. List of Documents, Exhibits and Other Attachments |
| C. SOW/PWS | K. Representations, Certifications and Other Statements of Offerors |
| D. Packaging and Marking | L. Instructions, Conditions and Notices to Bidders |
| E. Inspection and Acceptance | M. Evaluation Factors for Award |
| F. Deliveries or Performance | |
| G. Contract Administration Data | |
| H. Special Contract Requirements | |

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PMBOK – Knowledge Areas

- Integration
- Scope
- Time
- Cost
- Quality
- Human Resources
- Communications
- Risk
- Procurement

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Integration



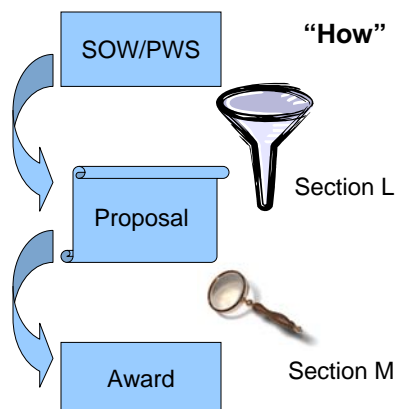
- Change Control
 - Questions from Responders
 - Amendments from Contracting Office
 - Answers to Questions
 - Clarifications to PWS/SOW
 - Extensions
 - Dissemination of Changes to Proposal Team

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Scope – Secondary Driver

- Write the Proposal
 - Storyboards
 - First Draft
 - Final Draft
 - Final Edits
 - Production
 - Shipping
- Daily Posting
- Designing a Sales Document



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Time – Primary Driver



- Schedule set by contracting agency – only they can extend
- Late proposal are non-responsive
- 80 – 80 – 80 Rule

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Cost

- Proposal
 - The B&P budget is not infinite!
 - Manage the budget
- Execution
 - Price realism
 - Best value means low cost
 - When under-priced proposals win,...



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Quality



- Reviews
 - Gold, Blue, Red, & Green Teams
 - Independent Look
- Lessons Learned
 - After the proposal submission
 - Request a formal debrief after award notification

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Human Resources

- Proposal Manager
 - Writers
 - SME
 - Editors
 - Graphics
 - Production
- Program Manager
- Staffing Solutions



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Communications



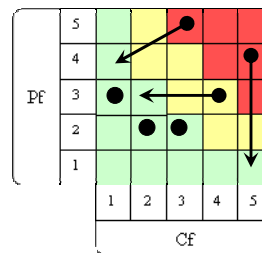
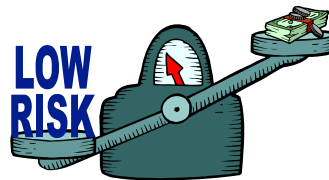
- Kick-off Meeting
 - Review Capture Plan & PMP
 - Schedule
 - Assignments
- Regular Team Meetings
 - Progress vs. the plan
 - Identification of Issues
 - Keep them short
- One on ones
- Co-located vs. Virtual Teams

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Risk

- Proposal Risk
 - Fancy or cute responses
 - No SME writers
 - Bad and defective pricing
 - Gaps in past performance
 - Staffing plan
 - The ticking clock,...
- Execution Risk
 - The "Hard" Stuff
 - Technical approach
 - Under-pricing the bid
 - Startup of a new venture is hard



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Procurements



Brand X



- Major Categories (other than Labor)
 - Major Subcontractors
 - Materials
 - Other Direct Costs
 - Travel
- Qualify Subcontractors
- Three Quotes
- Must be Documented!

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Project Management Processes

- Integrate with proposal processes
- Can use knowledge areas to improve proposal quality



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Questions

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